APP WALKTHROUGH · FEATURES · THEN PRACTICE

# Walk the real HRIS menus, then practise

Learn each navigation area and what users can do. Next: role cases and the Admin live demo. Prefer offline? **Open the PDF** (clickable contents).

WHO SHOULD READ THIS: All users · HR Admin · Recruiter · Training · Manager · Payroll · Staff · Practice

## Table of contents

**PDF tip:** Click any blue underlined section name below to jump to that page.

## Getting started

WHO
HR, managers, payroll, staff, admins

ACCESS
Browser on PC, tablet, or phone

HELP
Ask Guide AI + this manual search

1. **Open the HRIS URL** from your admin.
2. **Sign in** with corporate email (SSO / MSAL).
3. **Walk Part 1 — Features** using the sidebar map.
4. **Then do Part 2 — Practice** for your role (and Admin demo if training).
5. **Use Ask Guide AI** on any new screen.

## Login & corporate SSO (MSAL)

Staff sign in with official corporate email through Microsoft SSO. This keeps identity under DVLA control.

1. Open the login page.
2. Choose corporate / Microsoft sign-in.
3. Complete MFA if prompted.
4. Enter the HRIS with menus for your role only.

**Note:** Public Careers does not need staff login. Applicants apply and track separately.

## Navigation basics (as in the app)

**Purpose:** The left sidebar is the real map of the HRIS. Menus you do not see are outside your role permissions.

**In 60 seconds:**

1. Find your section label (Workforce, Reporting, Operations...)
2. Open a feature group
3. Use the sub-screens listed under that feature

| Sidebar area | What you find |
|---|---|
| **Dashboard** | Daily home snapshot |
| **Workforce** | Organization, Doc Templates, Recruitment, Onboarding, Employees, Leave, Training, Compensation |
| **Reporting** | Reports, Audit trail, Self Service |
| **Operations** | Approvals |
| **Administration** | Access control (Users, Roles) |
| **System** | Settings (Company profile) |
| **Public Careers** | External apply portal (not staff sidebar) |

**Done when:** You can name the sidebar area for your daily work.

## Ask Guide AI

Page-aware help that explains the screen you are on, next actions, and related pages.

1. Open any module page.
2. Open Ask Guide AI.
3. Read the page purpose and tips.
4. Ask a simple question if needed.

**Training tip:** Open Ask Guide AI before the trainer explains: discover first, then confirm.

## Part 1 — Features walkthrough

This is the main part of the guide. Walk each feature in the same order as the app sidebar. For every feature you will see: **purpose**, **sub-features / screens**, and **what users can do**. After you understand the product, go to Part 2 — Practice & demos.

### Dashboard

**Purpose:** Your landing page after login — see priorities for your role, then jump into work.

**In 60 seconds:**

1. Open Dashboard
2. Scan cards/charts for your role
3. Use the sidebar for the next task

| What you see | What you can do |
|---|---|
| **Summary cards / charts** | Spot pending work and status at a glance |
| **Quick orientation** | Decide which module to open next |

**Practise later:** Staff case · Cheat cards

**Done when:** You know today's priorities and opened the right menu.

### Public Careers (external portal)

**Purpose:** External candidates apply online; HR receives applications in one Applicants pool.

**Before:** Scattered emails and paper forms

**After:** Careers portal → Applicants pool

```
Browse roles → Apply → Applicant ID → Track (ID + email) → HR Applicants
```

| Sub-feature | What users can do |
|---|---|
| **Browse vacancies** | Candidates view open public roles |
| **Apply online** | Submit application details and documents |
| **Applicant ID** | Receive a reference for tracking |
| **Track status** | Check progress with ID + email; optional SMS/email updates |
| **HR Applicants pool** | Recruiters review the same applications inside Recruitment |

Example: erp.abusuprojects.com/careers

**Practise later:** Recruiter case · Admin demo (vacancy/applicant)

**Done when:** An application appears in HR Applicants with a trackable ID.

## Organization

**Purpose:** Master structure for DVLA — hierarchy, leave types, signatures, and related standards every other module uses.

```
Branch → Directorate → Department → Unit → Leave types / Signatures
```

| Sub-feature (app screen) | What users can do |
|---|---|
| **Analytics** | View organisation insights |
| **Branches** | Create and maintain branches |
| **Directorates** | Create and maintain directorates under a branch |
| **Departments** | Create and maintain departments |
| **Units** | Create and maintain units under departments |
| **Leave Types** | Define leave categories used by Leave |

| Sub-feature (app screen) | What users can do |
|---|---|
| Group Types | Configure group classifications where used |
| Signatures | Manage official signature standards |

### Doc Templates (Workforce)

Official templates by domain: Training, Onboarding, Recruitment, Employee letters, Leave, Loan, Disciplinary, Generated documents, Letter settings.

**Don't:** Create duplicate units with similar names — it breaks reporting and routing.

**Practise later:** Admin demo Steps 1–5 · HR Admin case

**Done when:** Structure exists and can be selected on employee/vacancy forms.

## Recruitment

**Purpose:** Run hiring end to end — from workforce need to hire conversion ready for onboarding.

```
Requisition → Vacancy → Applicants → Interview → Scores → Offer → Hire → Onboarding
```

| Sub-feature (app screen) | What users can do |
|---|---|
| Analytics | View recruitment pipeline insights |
| Job requisitions | Raise hiring needs; route for approval if required |
| Vacancies | Open roles for internal/external apply |
| Applicants | Review Careers and other applications in one pool |
| Interviews | Schedule and manage interview activities |
| Interview scores | Capture scored evaluations |
| Offer letters | Issue offers to selected candidates |
| Hires | Convert accepted candidates into employees |

**Practise later:** Recruiter case · Admin demo Steps 7–11

**Done when:** Hire is complete and onboarding can start.

## Onboarding

**Purpose:** Make new hires work-ready with tracked checklists, documents, induction, and payroll activation.

```
Checklists → Tasks → Documents & assets → Induction → Payroll activation → Confirmation → Probation
```

| Sub-feature (app screen) | What users can do |
|---|---|
| **Analytics** | Track onboarding progress |
| **Checklists / Checklist Tasks** | Define and reuse onboarding task lists |
| **Processes / Task Assignments** | Run a hire's onboarding process and assign work |
| **Document Verifications** | Verify certificates and required documents |
| **Asset Provisions** | Issue tools/assets to the new hire |
| **Induction Schedules** | Plan induction sessions |
| **Payroll Activations** | Activate pay setup for the new staff |
| **Employee Confirmations / Probation Reviews** | Confirm appointment and review probation |

**Practise later:** Admin demo Step 12 · HR Admin case

**Done when:** Critical checklist items are complete and payroll activation is underway.

## Employees

**Purpose:** Central staff records, plus formal disciplinary and grievance handling.

| Sub-feature (app screen) | What users can do |
|---|---|
| **All Employees** | Search, view, and maintain employee records |
| **Disciplinary** | Log and manage disciplinary cases (often with Approvals) |
| **Grievances** | Log and manage grievance cases (often with Approvals) |

**Practise later:** HR Admin case · Manager approvals

**Done when:** Record is accurate, or a case is logged and routed.

## Leave

**Purpose:** Fair, trackable time-off — staff request, managers approve, HR sees balances and policy.

```
Policies / leave types → Balances → Request → Approval → Balance update
```

| Sub-feature (app screen) | What users can do |
|---|---|
| **Analytics** | View leave patterns and summaries |
| **Requests** | HR/managers review leave requests |
| **Leave Balances** | Check and manage entitlements |
| **Policies** | Configure leave rules |
| **Self Service → My Leave** | Staff apply and track their own leave |

**Practise later:** Staff case · Manager case

**Done when:** Request status is clear and balance reflects the decision.

## Training & development

**Purpose:** Plan and deliver measurable learning across programmes, sessions, attendance, and feedback.

```
Setup → Program → Nomination/Enrollment → Session → Attendance → Assessment/Survey
```

| Sub-feature (app screen) | What users can do |
|---|---|
| Categories / Providers / Locations | Set up training reference data |
| Programs | Create learning programmes |
| Needs assessments / Nominations | Identify needs and nominate learners |
| Sessions / Enrollments / Attendance | Run sessions and record who attended |
| Member groups | Group learners for delivery |
| Assessments / Surveys | Collect scores and feedback (staff may complete in Self Service) |

**Practise later:** [Training Head case]

**Done when:** Attendance is saved and feedback/assessment is available.

## Compensation & payroll

**Purpose:** Configure pay standards, maintain salary/loans, process the period, review runs, and issue payslips.

**Before:** Spreadsheet pay cycles

**After:** Setup → Process → Review run → Payslips

```
Setup → Employee salary → Process payroll → Runs → Payslips
```

| Sub-feature (app screen) | What users can do |
|---|---|
| Overview & flow | See how payroll pieces connect |
| Grades & notches / Component catalog / Pay components | Define pay building blocks |
| Tax configuration / Salary structure | Configure tax and structures |
| Employee salary | Maintain individual salary assignment |
| Loans / Loan schemes / Applications / Employee loans | Manage loan products and staff loans |
| Process payroll / Payroll runs | Run and review a pay period |
| Payslips | Produce slips staff view in Self Service |

**Don’t:** Finalise a run without reviewing exceptions.

**Practise later:** [Payroll Officer case]

**Done when:** Run is reviewed and payslips are available to staff.

## Approvals (Operations)

**Purpose:** One decision hub for pending items — faster, visible, linked back to the source record.

**Before:** Decisions in email threads

**After:** One Approvals queue

| Sub-feature (app screen) | What users can do |
|---|---|
| **Leave requests** | Approve or reject team leave |
| **Loan requests** | Decide on loan applications |
| **Job requisitions** | Approve hiring needs |
| **Onboarding / Training** | Clear related pending items |
| **Disciplinary / Grievances** | Decide formal case steps in your queue |

**Don't:** Approve without checking dates, amount, or requester.

**Practise later:** Line Manager case

**Done when:** Queue item is cleared and the source record shows the decision.

## Self Service

**Purpose:** Employee portal for everyday personal HR tasks without visiting the HR desk.

| Sub-feature (app screen) | What users can do |
|---|---|
| **My Profile** | View/update personal details |
| **My Leave** | Request leave and track status |
| **My Payslips** | Open payslips after payroll |
| **My Loans** | View loan status |
| **Internal vacancies** | Browse and apply to internal roles |
| **Take assessment / Submit survey** | Complete Training assignments |

**Practise later:** Staff case · Admin demo Step 13

**Done when:** Request or update is saved and status is visible.

## Reports

**Purpose:** Operational and management evidence by domain — filter, review, export where enabled.

| Sub-feature (app screen) | What users can do |
|---|---|
| Report catalog | Browse available reports |
| Recruitment / Onboarding / Employees | Domain reports for workforce topics |
| Leave / Training & Development / Compensation | Domain reports for people operations and pay |

**Done when:** You have the figures or export needed for the meeting.

## Audit trail

**Purpose:** Accountability — who did what, when — for investigations and compliance.

| Sub-feature (app screen) | What users can do |
|---|---|
| Audit catalog | Browse audit views by domain |
| Domain audit (Recruitment… Compensation) | Filter history for investigations |

**Done when:** You can point to action, actor, and timestamp.

## Access control & Settings

**Purpose:** Least-privilege access (Users/Roles) and institutional settings (Company profile).

| Sub-feature (app screen) | What users can do |
|---|---|
| Users | Create and maintain system users |
| Roles | Assign permissions matching job needs |
| Settings → Company profile | Maintain institutional configuration |

**Don’t:** Give Admin rights “just in case.”

**Practise later:** Admin demo Step 6 (create user) · HR Admin case

**Done when:** User sees only the menus their role requires.

## Security tips

**Purpose:** Protect people and pay data with simple daily habits.

**In 60 seconds:**

1. Use your own corporate SSO only
2. Work only in menus your role needs
3. Log out on shared devices

1. Use your own corporate SSO login only.
2. Do not share passwords or stay logged in on shared PCs.
3. Open only modules your role needs.
4. Treat people and pay data as confidential.

5 Log out when finished.

**Done when:** Session is yours alone and closed when you leave the desk.

## Part 2 — Practice & demos

You have walked the menus and features. Now reinforce them: use role cheat cards, the Admin live demo with sample data, and the practice cases for your role.

## Role cheat cards (2 minutes)

Use these after you know the features. Three daily jobs, where to click, and what "done" looks like.

### HR Admin

1) Keep structure clean 2) Manage users/roles 3) Support hire → onboard

```
Organization → Access → Onboarding
```

**Done when: unit exists, access is correct, new hire checklist is open.**

### Recruiter

1) Raise/publish roles 2) Review applicants 3) Interview → offer → hire

```
Recruitment → Careers applicants → Hire
```

**Done when: candidate is hired and handed to onboarding.**

### Training Head

1) Create programme 2) Enroll learners 3) Session + attendance + feedback

```
Training → Program → Session → Assessment
```

**Done when: attendance is recorded and feedback is collected.**

### Line Manager

1) Open Approvals 2) Clear leave/loans/requisitions 3) Confirm status

```
Approvals → Review → Approve / Reject
```

**Done when: queue is clear and source records show the decision.**

### Payroll Officer

1) Confirm pay setup 2) Process period 3) Review runs & payslips

```
Compensation → Process payroll → Runs → Payslips
```

**Done when: run is reviewed and payslips are available to staff.**

### Staff

1) Update profile 2) Request leave 3) View payslip / complete survey

```
Self Service → My Leave / My Payslips
```

**Done when: request is submitted and status is visible.**

## Practice cases: learn by doing

After the features walkthrough, choose your role and practise end to end. Each step links back to the matching feature section. For exact sample values to type live, open the Admin demo (sample data).

**Admin live demo**

### Sample data walkthrough

Exact fields and tabs to enter during training so the demo works end to end.

**HR Admin**

### Set up structure, then hire

Create departments/units, manage access, publish a vacancy, and move a hire into onboarding.

**Recruiter**

### From requisition to offer

Run the full recruitment pipeline including Careers applicants.

**Training Head**

### Deliver a learning programme

Build program, session, enrollment, attendance, assessment.

Line Manager

**Approve team requests**

Clear leave, loans, and requisitions from one approvals hub.

Payroll Officer

**Run a clean pay cycle**

Confirm salary setup, process payroll, review payslips.

Staff

**Self-service day**

Update profile, request leave, view payslip, check internal jobs.

## Admin User Case: live demo with sample data

**Story:** You are **Admin Ama Mensah**. You will set up a small piece of DVLA structure, create a leave type, add a staff user, raise a job requisition/vacancy, capture an applicant, and start onboarding. Use the *exact sample values* below during training so every tab works.

```
Login > Organization > Leave type > User/Role > Requisition > Vacancy > Applicant > Hire >
Onboarding checklist
```

**Trainer tip:** Keep this page open on a second screen. Enter the sample data as written. Trainees can copy the same values on their practice environment.

### Step 0. Login

Login

**Use**

Email
your corporate admin email (SSO)

Role expected
HR Admin / System Admin

## Step 1. Create Branch

Organization    Branches

Go to **Organization > Branches > Add / New**.

**Enter these values**

Branch name
DVLA Accra HQ Demo

Branch code
ACC-HQ-DEMO

Location / City
Accra

Status
Active

Notes
Training demo branch (safe to keep)

## Step 2. Create Directorate

Organization    Directorates

**Enter these values**

Directorate name
Human Resource Management Demo

Code
HRM-DEMO

Branch
DVLA Accra HQ Demo

Status
Active

## Step 3. Create Department

Organization    Departments

**Enter these values**

Department name
Talent Acquisition Demo

Code
TA-DEMO

Directorate
Human Resource Management Demo

Status
Active

## Step 4. Create Unit

Organization  Units

**Enter these values**

Unit name
Recruitment Operations Demo

Code
RO-DEMO

Department
Talent Acquisition Demo

Status
Active

## Step 5. Add a Leave Type

Organization  Leave Types

**Enter these values**

Leave type name
Annual Leave Demo

Code
AL-DEMO

Days / entitlement
21

Paid
Yes

Status
Active

## Step 6. Create a demo staff user

Access control · Users

**Enter these values**

Full name
Yaw Boateng Demo

Email
yaw.boateng.demo@dvla.gov.gh

Phone
0244001122

Role
Employee / Staff (as available)

Department / Unit
Talent Acquisition Demo / Recruitment Operations Demo

Status
Active

## Step 7. Create Job Requisition

Recruitment · Job requisitions

**Enter these values**

Title / Position
Licensing Officer Demo

Department
Talent Acquisition Demo

Unit / Branch
Recruitment Operations Demo / DVLA Accra HQ Demo

Employment type
Permanent / Full-time

Number of positions
1

Justification
Training demo requisition for Licensing Officer

Status action
Submit for approval (if required)

## Step 8. Create / publish Vacancy

Recruitment    Vacancies

**Enter these values**

Vacancy title
Licensing Officer Demo

Linked requisition
Licensing Officer Demo

Opening date
Today date

Closing date
Today + 14 days

Publish externally
Yes (Careers), if available

Short description
Demo vacancy for DVLA HRIS training. Apply with accurate contact details.

## Step 9. Add / review Applicant

Recruitment    Applicants

**Enter these values**

First name
Abena

Last name
Owusu Demo

Email
abena.owusu.demo@email.com

Phone
0201112233

Vacancy
Licensing Officer Demo

Status
Applied / Under review

## Step 10. Interview + score (optional)

Interviews    Interview scores

**Enter these values**

Applicant
Abena Owusu Demo

Interview date
Tomorrow 10:00

Panel note
Demo interview panel

Score
82 / 100

Recommendation
Recommended for offer

## Step 11. Offer letter + Hire conversion

Offer letters    Hires

**Enter these values**

Candidate
Abena Owusu Demo

Offer title
Licensing Officer Demo Offer

Start date
Next Monday

Hire / conversion
Complete hire conversion

## Step 12. Start Onboarding checklist

Onboarding    Processes / Checklists

**Enter / tick these demo tasks**

Employee
Abena Owusu Demo

Task 1
Collect ID / certificates (Done)

Task 2
Issue staff ID request (In progress)

Task 3
Schedule induction (Next Tuesday 09:00)

Task 4
Payroll activation (Pending)

## Step 13. Staff self-service check (optional)

Self Service

**If demo staff login is available**

Open
My Profile / My Leave

Leave type
Annual Leave Demo

Dates
Next month, 2 days

Reason
Training demo leave request

**Success check:** After this walkthrough you should see the demo branch/dept/unit, leave type, vacancy, applicant, and an onboarding process. That is a complete Admin user case for training.

## Case A: HR Admin structure to hire

**Story:** You are Ama, HR Admin. A new unit needs setup, then you support hiring an officer and onboarding them.

```
Organization (branch/dept/unit) → Access (users/roles) → Vacancy → Applicants → Hire →
Onboarding checklist
```

1. **Confirm organisation structure**: open Branches / Directorates / Departments / Units and add or verify the new unit. Open Organization guide →
2. **Check access**: ensure the hiring manager and recruiter have the right roles. Open Access control →
3. **Support vacancy creation**: work with recruiter on requisition/vacancy. Open Recruitment →
4. **Watch applicants arrive** from Careers into Applicants pool. Open Careers →
5. **After hire, start onboarding**: checklists, documents, induction, payroll activation. Open Onboarding →

6 **Use Ask Guide AI** on any new screen. Open Ask Guide AI →

## Case B: Recruiter requisition to hire

**Story:** You are Kofi, Recruiter. Fill one open role from request to hire conversion.

```
Requisition → Vacancy → Careers apply → Applicants → Interview → Scores → Offer → Hire
```

1. **Create / manage job requisition** and wait for approval if required. Recruitment steps → Approvals →
2. **Publish vacancy** for external Careers where configured. Careers →
3. **Review Applicants pool** and shortlist.
4. **Schedule interviews** and capture scores.
5. **Issue offer letter**, then complete hire conversion.
6. **Hand over to onboarding.** Onboarding →

## Case C: Training Head run a programme

**Story:** You are Akosua, Training Head. Deliver one short leadership programme end to end.

```
Categories/Providers → Program → Nominations/Enrollments → Session → Attendance →
Assessment/Survey
```

1. **Check setup**: categories, providers, locations. Training module →
2. **Create the program** and link needs if required.
3. **Nominate / enroll learners.**
4. **Create session** and take attendance.

5. **Publish assessment / survey**; staff complete via Self Service. Self Service →
6. **Report outcomes** in Training reports. Reports →

## Case D: Line Manager approvals day

**Story:** You are Mensah, Line Manager. Clear pending team requests in one place.

```
Open Approvals → Review item → Approve/Reject → Confirm source record updated
```

1. **Open Approvals hub.** Approvals guide →
2. **Process leave requests** for your team. Leave →
3. **Process loan requests** if assigned. Compensation / loans →
4. **Approve job requisitions** when asked. Recruitment →
5. **Check onboarding/training pending** items if in your queue.

## Case E: Payroll Officer pay cycle

**Story:** You are Efua, Payroll Officer. Prepare and complete one payroll period carefully.

```
Grades/components/tax/structure → Employee salary → Process payroll → Payroll runs → Payslips
```

1. **Confirm pay setup** (components, tax, structures). Compensation →
2. **Review employee salary** records for changes.
3. **Process payroll** for the period.
4. **Review payroll run**, then payslips.

5 **Staff view payslips** in Self Service. Self Service →

**Careful:** Always review before finalising: payroll affects real money.

## Case F: Staff self-service day

**Story:** You are Yaw, Staff. Handle your own routine HR tasks without visiting the HR desk.

```
My Profile → My Leave → My Payslips → My Loans → Internal vacancies → Assessment/Survey
```

1. **Open Self Service → My Profile** and confirm your details. Self Service →
2. **Apply for leave** and track status. Leave →
3. **Open My Payslips** after payroll.
4. **Check My Loans** if you have one.
5. **Browse Internal vacancies** if you want to apply.
6. **Complete assessment/survey** when Training assigns one. Training →

## Quick reference: who does what

| Role | Daily start | Practice |
|---|---|---|
| HR Admin | Organization / Access / Onboarding | Case A · Cheat card |
| Recruiter | Recruitment + Careers | Case B |
| Training Head | Training | Case C |
| Line Manager | Approvals | Case D |
| Payroll Officer | Compensation | Case E |
| Staff | Self Service | Case F |

| Role | Daily start | Practice |
|---|---|---|
| **Anyone stuck** | Ask Guide AI + Search | Guide AI |

DVLA HRIS User Training Manual · Digich Technologies Core Suite ERP · Careers: https://erp.abusuprojects.com/careers